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**CORRESPONDENCE MEMORANDUM**

**DATE:** March 29, 2006

**TO:** Employee Trust Funds Board  
Teachers Retirement Board  
Wisconsin Retirement Board

**FROM:** Linda Owen, Policy Analyst  
Division of Retirement Services

**SUBJECT:** Results of File Reviews after Solie and Baxter Court Decision

To date we have received approximately 375 inquiries from participants asking whether they are eligible for service credit under the Solie and Baxter court decision. Most of these inquiries resulted from the articles in the September and January issues of the *Trust Fund News* newsletter. So far we have reviewed the accounts of 276 participants, 18 with related appeals and 258 who inquired. Sixteen of the 18 accounts with pending appeals were eligible for service credit; however, only 24 of the 258 participants who inquired were eligible. Once we determine whether a participant is eligible, each participant receives a letter explaining either the reason why no service can be granted, or the amount of service for which they qualify and the effects on their account or annuity.

To date we have granted 155.01 years of service under the court's decision. Many eligible participants had already purchased their forfeited service, and we have refunded \$309,451.87 in forfeited service payments (including interest when applicable). Other participants who did not buy their forfeited service before they retired have received retroactive annuity increases as a result of the additional service; we have issued \$347,676.22 in retroactive annuity supplements (including interest as provided by law), in addition to the prospective annuity increases.

A few retired teachers are eligible for additional service under the court's decision, but do not get any additional benefits from the additional service because their annuities are still higher under the money purchase calculation. Most of the participants who are not eligible either have already received credit for the service at issue under the Benson court decision or did not withdraw their contributions under the "combined group" laws. Others have never withdrawn any contributions, and a few have never been teachers.

There are currently about 115 accounts left to review, and calls and letters continue to trickle in. We are putting an article in the spring *Trust Fund News* newsletter for inactive participants, which we expect to generate a few additional inquiries.

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